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RESULTS OF RESEARCH FOR A CENTRALIZED DATABASE AND ORDER DESK FOR GOVERNMENT PUBLICATIONS

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Executive Summary

The following report reviews the findings of two research studies — a mail questionnaire and two focus groups — conducted to assist Canadian Government Publishing (CGP), formerly CCG-P, to reposition itself and its services among its current and potential clientele.

In particular, the research focussed on gauging client reactions to a number of services that CGP currently offers or might wish to offer in the future to its client author departments. The primary objective of the research was to solicit and assess client departments' reactions to the establishment of a centralized database and order desk.

Research findings indicate that there is qualified support for a centralized database and order desk, particularly if it is to play a co-ordinating rather than regulatory role. Concerns that were raised centred on the service's long-term viability, cost effectiveness and efficiency. Managers suggested that success could be more fully achieved if the service began "small", focussing first on collecting data on priced publications. Research indicates that many departments already have information on these publications electronically stored. Furthermore, listings of their publications are available on their Internet sites.

Other challenges facing a centralized service include departmental "buy-in", defining such terms as "publishing" and "publications", providing guidelines on what should be inputted, in what format, using what software. Participants also suggested that assistance with collecting and compiling the required information — either through funding or human resources — would greatly increase co-operation and support for the project since most departments were on appropriations with no opportunity to benefit from revenues received directly from the sale of publications.

Another area of interest among respondents and participants was that of "publications management services". Findings reveal that managers would like to obtain guidance and advice in some 20 publishing-related topic areas. Of particular interest were crown copyright and licensing, Internet publishing guidelines, Depository Services Program and co-publishing.

With respect to publishing activities required in the future, in-house resources were cited most often for past and future publishing activities. However, for a number of activities, at least one in five respondents reported having a need for CGP assistance particularly in the areas of production; order processing and customer services; promotion; after sales analysis; and, market analysis. When questioned on their requirements for warehousing, inventory management, and distribution, one-third of respondents indicated that they would use in-house resources. The remainder cited at least six other options, including P.A.A., private sector and combinations of in-house, P.A.A. and private sector alternatives.

With respect to communications, managers indicated that they would like to have more information on publishing issues. They suggested that communication be through e-mail, fax, mail, and/or presentations.

1 Background and Introduction

While most parts of the Canada Communication Group have been privatized, certain functions — which were preciously grouped in the Publishing Division (CCG-P) — have been retained and currently reside within their home department, Public Works and Government Services Canada. The former CCG-Publishing, now known as Canadian Government Publishing (CGP), is currently taking steps to reposition itself and its services among its current and potential clientele.

In particular, CGP was interested in gauging client reactions to a number of services that it currently offers or might wish to offer in the future to its client author departments. The primary objective of the study was to solicit and assess client departments' reactions to the establishment of a centralized database and order desk.

2 Research Objectives

2.1 Mail Questionnaire

The objectives of the mail questionnaire survey were to access client departments' reactions to the establishment of a common service that would see CGP providing an array of services to author departments, including:

- creation and management of a publications database, which records all federal government publications currently in the inventory;
- provision of a single access point and order desk, for external enquiries and orders, sales and receivables on behalf of the client department;
- guidance and administration on copyright and negotiation of licensing agreements, etc.; and,
- project management services and specialized development, production, and marketing services.

Full results from the mail questionnaire are found in Appendix B.

2.2 Focus Groups

To explore in depth why certain quantitative results were observed in the survey research, focus research focussed on meeting the following objectives:

- to determine the level of support and conditions under which clients would support a centralized order desk;
- to gauge concerns about a central order desk;
- to explore clients definition of certain publishing activities;

- to determine current methods of distribution;
- to determine preferred methods of communications; and,
- to ascertain key messages and venues.

Full results from the focus groups are found in Appendix A.

3 Methodology

Approximately 200 survey questionnaires were mailed to federal government managers responsible for publishing (see Questionnaire found in Appendix C). A total of 86 completed questionnaires were returned by mail or fax, for a response rate of 43 per cent. Assuming the total population of managers involved in publishing were reached by the survey, and those who responded are representative of the total population, the returns would provide a margin of error for estimates to within ±7.5%, 19 out of 20 times. (See the *Mail Questionnaire Survey Report*, Appendix B.)

To explore the quantitative data of the mail survey, two focus groups were conducted, one with managers having a publishing element as an integral part of their program. The first focus group was comprised of managers from large departments; the second, from small departments. Each focus group had eight participants. The focus groups followed a moderator's guide (see Appendix D) that was reviewed and approved by the client. (The demographics of the participants are found in Appendix E.)

4 Research Findings

4.1 Supporting a Centralized Database and Order Desk Service

In the mail survey, respondents were presented with the following scenario:

A recent, independently-conducted, consultation with users of published government information indicated that customers, i.e., the Canadian public, "want to be able to go to one place for all government publications, rather than call a series of departments in search of their title; and they want to be able to both identify and order that publication in a single transaction."

a) Given that such a point of service requires departmental support and government-wide coordination, with the benefit being increased customer satisfaction, do you support government providing a centralized service to manage order processing, enquiries and customer service (i.e., complaints, returns etc.)?

Figure 1 presents the responses to this scenario. Overall, over three-quarters of respondents supported the idea of a single government point-of-service for publications. Respondents who strongly supported the service said it was because there is a need for central turnkey services and the central service would be more efficient.

Respondents who only somewhat supported the service voiced concerns about the following issues:

- efficient use of resources;
- central "turnkey" as the only and best option available;
- adequate monitoring by client departments;
- timeliness of distribution;
- loss of client contact;
- consistency of policies;
- the provision of alternative formats.

Respondents who did not support the service said that a centralized services would not be efficient and that adequate monitoring would not be possible. Some respondents also felt that there was no need for "turnkey" services, while others were concerned that alternative formats would not be adequately addressed, nor would there be consistency in policy development.

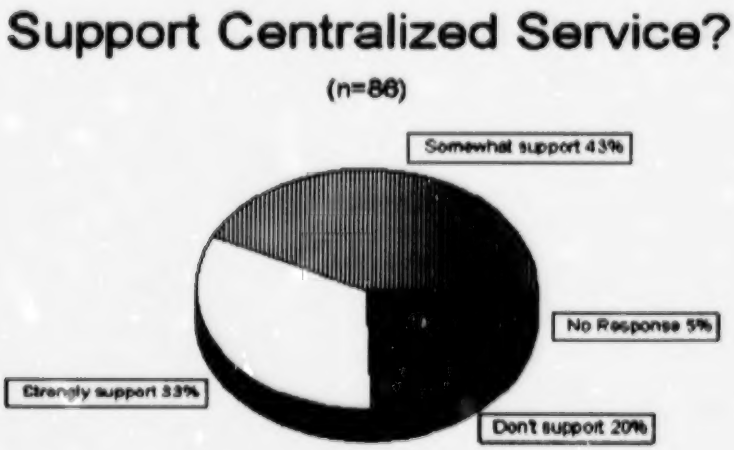


Figure 1

After some discussion of the idea, participants in the focus groups, on the other hand, were far more supportive of the notion of a centralized service, lending almost unanimous support for the project. Their only caveat was that the service be coordinating in nature, with control residing in departments. As one respondent said:

> *"It appears to me that a lot of it depends on the status of the publishing distribution system. We're back to whether you're talking about offering a service or you're talking about a regulatory body. I think if you're talking about a service, I think that it's a great way to do it."*

That having been said, focus group respondents strongly agreed that a centralized order desk would be highly beneficial and contribute to higher levels of customer satisfaction. Participants, for example, were extremely sensitive to the needs of Canadians, as well as booksellers, searching for particular publications. The following two quotes are reflective of the sentiments expressed by many of the focus group participants:

> *"We can make the distinction of which publications are produced by what department, but the average person who calls in...Maybe they're even calling in long-distance. We can't expect the public to know the vagaries of the bureaucracy and who they're supposed to talk to. It would be much better to have one number."*

> *"From the public perspective, the public wants one place to deal with. They don't want to go to one department and be told 'we don't handle that'. You have to go here, there and everywhere. If departments want to do their own publishing, that's fine. They should be required to give a certain number of their publications to a central order desk. You've got to look at it from a consumer's side."*

While participants were supportive of the centralized service, discussion ensued on how the service would work. Interpretation of the definition, role and workings of a centralized order desk varied widely.

While most participants agreed that the service should be one of co-ordination rather than control, there was far less consensus on such issues as what should be distributed and whether the service should include physical storage. A number of participants suggested that the service only be responsible for priced information. One participant felt that the service should merely be a call-in center, directing interested parties to the responsible department. Another participant shared the same views, but suggested that in addition to directing the call to the appropriate department, the service should have abstracts of not only the publication in question,

but others which might be complimentary, or emanating from other departments or agencies. Still others expressed that it be more inclusive, offering a wide range of services: warehousing, inventory management and control, order taking and payment.

> *"I thought when you said one-stop shopping it meant they do the whole thing. They print, they distribute, and whatever they have to do with it. In this case, it's totally different form the perspective that I have."*

With respect to supporting a centralized database, more than half of the focus group participants saw the benefits of such a centralized service, referring to their own department's success as a measure of comparison. Those having such a database use it to publicize their publications over the Internet. The remaining participants indicated that due to the size of their departments, or because of restructuring or lack of resources, no such database existed.

Mail respondents expressed the same views. Almost half of them (45 per cent) reported their organizational unit could supply information manually on all of its active publications holdings to a government-wide, central database by December 31, 1997, while an additional 22 per cent could provide some information. Although 20 per cent did not know, only four per cent said they could not provide any information. Two respondents indicated they would not be able to comply unless resources were made available to them. Focus group participants also reported being able to provide information to a centralized database. Limited resources, however, were often cited as a major reason for not being able to comply fully with the requirements.

Fewer survey respondents, slightly more than a third (37 per cent), said their organizational unit could supply this information electronically, while 28 per cent could provide some information. Again, 19 per cent did not know and four per cent could not provide any information. While two respondents again mentioned a lack of resources, four respondents said it would depend upon the specific reporting requirements.

4.2 Challenges of Establishing a Centralized Database and Order Desk

While many focus group participants voiced support for such a service, they were also fully aware of some of the major challenges accompanying this kind of venture. Many participants felt departmental "buy-in" was a critical factor. Past experiences with "centralized" projects, many of which they have seen fail, have left participants somewhat hesitant and reluctant to support similar ventures. They need to see some proof that the project is viable and cost-effective — less costly than the system that they are currently using.

"I think we've had that experience and I think it's always in our mind. Is it going to work? Prove it to me first. Then I'll think about it."

Two other participants elaborated on the reluctance of "buying-in", one citing potential of job-loss; the other, resistance to change.

"Would we be losing our jobs in our branch if we go with that choice?"

"It's good, but don't change my routine."

Yet another challenge facing a centralized database and order desk is communicating the definition of a "publication". From the two focus groups conducted, it was evident that participants were at times talking at cross-purposes, with different understandings of such terms as "publications" and "publishing". More often than not, participants confused printing costs with publishing costs. Similarly, most participants lumped free and priced materials into one category, calling them all "publications".

"What's a publication? That's the question. One sector...produced, by their definition, over seven hundred publications a year. But in some cases, they only printed five copies. Is that a publication? ...Is a CD-ROM a publication?

Technology was also cited as a major challenge in the focus groups. One participant felt that the proliferation of various programs and architectures would make it difficult for a centralized service to collect and collate all the recorded publications. Which program would best meet a government-wide registry system? How compatible would it be for the centralized service, the department and, ultimately, the end user -- particularly if he/she is accessing the database through Internet? The other challenge posed by technology relates to Internet, with its myriad self-publishing opportunities. Linked to the aforementioned challenge of defining "publishing", it was felt that departments could not feed and maintain a centralized system without first receiving clearly defined guidelines on what should be inputted, in what format, and using what software.

"Just getting all the information, and making sure that everybody's using the same kind of technology...that's well beyond my capabilities. I've certainly discovered over the years that nobody seems to be using the same type of technology because you can't down-load anything from anybody else's as easily.'

"With the advent of Internet, potentially any one of us could be a publisher. So again, what is a publication?"

Gathering the data and keeping it current were as also seen as major challenges. Participants from large departments or operating under severe budgetary constraints indicated that pulling data together to feed a centralized database would require a great deal of time and resources.

"It would be a job to go around and ensure that we have a good up-to-date list of everything that is available. One person would have to be dedicated to that for quite a while."

Finally, one participant mentioned the need to keep many stakeholders satisfied — departments as well as retailers and end-users.

"Answering too many publications. Answering too many clients. Answering the clients' requests about the contents of these publications which they have nothing to do with. It's a big challenge."

4.3 Overcoming the Challenges

The majority of focus group participants voiced some skepticism as to how a centralized service could succeed given the number of challenges that it would face. That having been said, participants felt that a centralized service offering tangible support, in the way of monetary or human resources, would go far in securing the success of the project. Given that many departments are working under severe monetary and human constraints, it would be doubtful whether they could fully meet the requirements that such a project would demand without some type of support.

"They could have somebody catalogue everything and load it on to a database and have somebody who's going to do that on a regular basis and maintain it."

It was also felt that achieving credibility by demonstrating a working system, with benefits (including lowered costs and prices, less work from departmental employees, and more customization options for the client) would greatly encourage participation.

"If somebody was to come to me and say, 'We have a system running here. See, it works. Would you be interested in participating in it for X number of dollars per year?', the answer would be yes, because then you're talking about something you can see determining what it is or isn't."

With respect to its initial offerings, many participants felt that the centralized service should start with mandatory, priced information. It was felt that including all publications — free and priced, print and electronic — would be too difficult and unwieldy to manage. By choosing a narrower scope, with more defined parameters, many participants felt that the service would have greater appeal for departments, and therefore, greater chance for success.

Based on the mail questionnaire findings, there appears to be sufficient data on priced information to initially construct a centralized database. Figure 2 shows the breakdown of priced publications (print and electronic) that are currently available to the public.

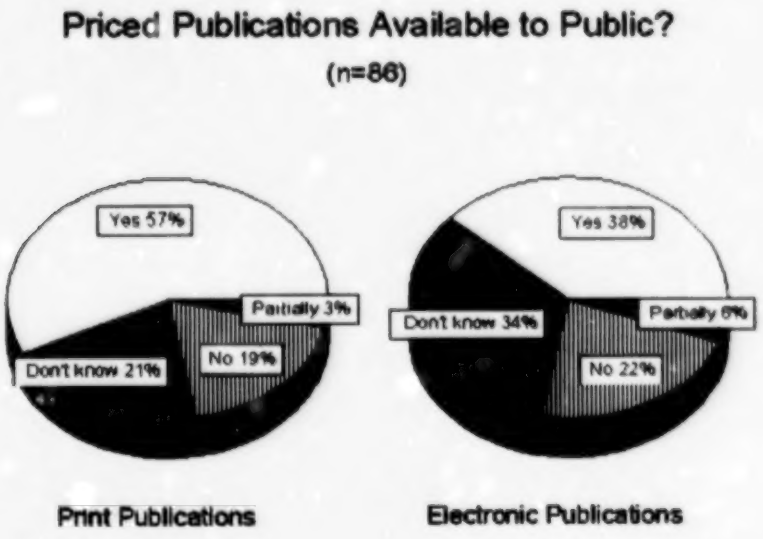


Figure 2

The majority of respondents reported that their organizational unit makes copies of both their print and electronic priced publications available to the general public. This availability is exclusive of the Depository Services Program and its library network. Interestingly, a large proportion of respondents were not aware of what was made available to the public, possibly indicating a lack of focus or priority given to this function by managers.

Furthermore, for priced publications, a quarter of the respondents indicated that distribution services for print publications were handled in-house, while only slightly

more indicated that the services were handled externally (28%). Eight percent reported this service was provided both internally and in-house, and over one-third (38%) did not know. Of those respondents who reported external sources, the CCG, PWGSC, other government services, and commercial printers were mentioned most frequently.

Further, electronic publications were handled in-house by 30 per cent of units; externally by eight per cent of units; and both in-house and externally by eight per cent. Well over half of the respondents were unable to answer (59 per cent did not know). The external sources mentioned included PWGSC, CCG, university printers, other government services, and secondary distributors.

Fifty-six percent of all mail respondents reported keeping a listing of all of their publications, and a further 29 per cent keep partial listings. Only 12 per cent keep no publications listings at all (see Figure 3).

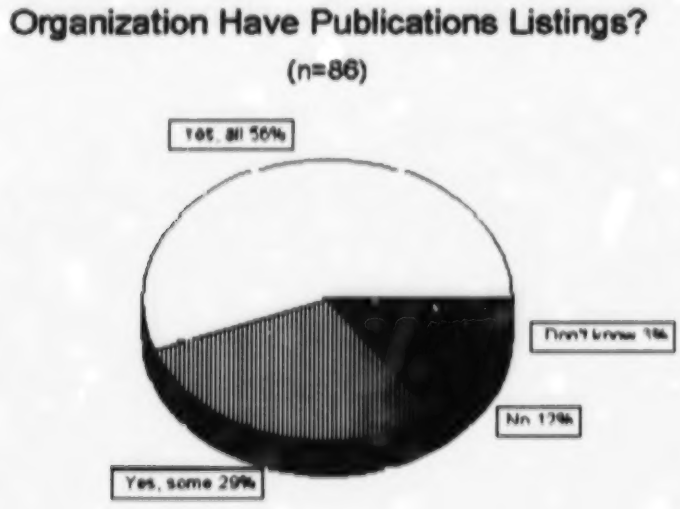


Figure 3

Of those organizations that keep full or partial listings of their publications, the following information was included:

1. Title	88 %
2. Catalogue number	58 %
3. ISBN or ISSN number	53 %

4. Format	51 %
5. Abstract or description	43 %
6. Unit price	36 %
7. Location	34 %
8. Inventory information	27 %
9. Distribution list	25 %
10.Unit cost	15 %

4.4 Publications Management Services

Respondents indicated whether or not they would likely need advice or guidance on any of 20 topic areas. The results show that a substantial proportion of respondents report a need in most areas. The following percentages of all respondents indicated likely needing advice or guidance in each of 20 topic areas:

1. Crown copyright and licensing	58 %
2. Internet publishing guidelines	45 %
3. Depository Services Program	43 %
4. Co-publishing	41 %
5. Costing and pricing guidelines	36 %
6. Electronic publishing	35 %
7. Sales and promotion practices	34 %
8. Communications policy (publishing)	33 %
9. Contracting procedures	30 %
10. Publishing on-demand	29 %
11. Alternate format policy	24 %
12. Market analysis practices	23 %
13. Methods of dissemination	22 %
14. Federal Identity Program	21 %
15. Format options	17 %
16. Official Language policy	13 %
17. Retailing policies	13 %
18. Delegation authorities	11 %
19. Wholesaling policies	7 %
20. Accounting practices	1 %

Respondents were asked to comment on the following scenario:

If a central government organization offered publications management services — that is, contract management including project coordination, consultation, and advice on publishing activities and issues — would you be interested in obtaining these services?"

Almost half of the total respondents indicated that they would not be interested in this type of central government service. Over a third of the respondents had a conditional answer, and the most frequently mentioned factors affecting their decision were as follows:

- the competitiveness/cost-effectiveness of the central service;
- the added value the central service could offer;
- the willingness of the central service to play a limited role, and;
- the particular operational procedures that would be involved. Figure 4 shows respondents' reaction to the scenario:

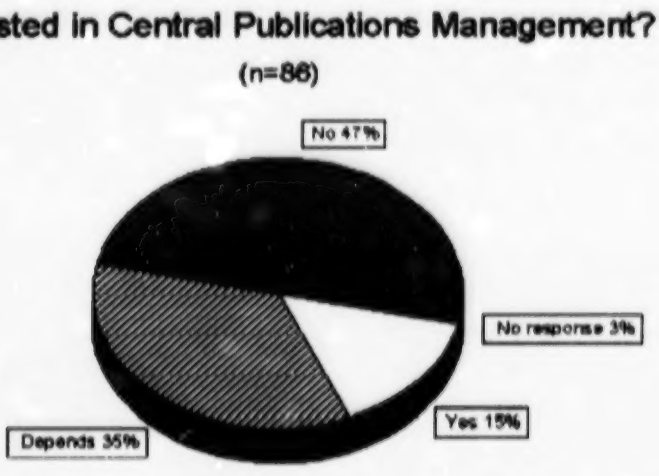


Figure 4

Among focus group participants, however, there was almost unanimous agreement that guidance and advice for certain publishing-related subject areas was required. Though one participant suggested that much of the information was already available through Treasury Board, participants nevertheless indicated that further elaboration on the topics was required.

In addition to the aforementioned topics, additional probing was conducted to determine whether assistance was required in the areas of wholesaling, delegation of authorities and accounting practices. Although not rated highly in the mail questionnaires, responses indicated that few participants understood the terms or their implications on the publishing process.

4.5 Publishing Activity

Mail respondents were requested to list what sources had been used in the past and what sources they believed they would use in the future for twelve publishing activities.

In general, in-house resources were cited most often for past and future publishing activities. Private sector sources were the next most mentioned sources. However, for a number of activities, at least one in five respondents reported having a need for PWGSC-Publishing, although the proportion is less than reported use of CCG-Publishing in the past.

For the purposes of this report, only those activities which were mentioned by more than 20 per cent of respondents is highlighted. Estimated past and anticipated future use for each of the 12 sources can be viewed in their entirety in the accompanying report, *Questionnaire Survey of Government Publishing*.

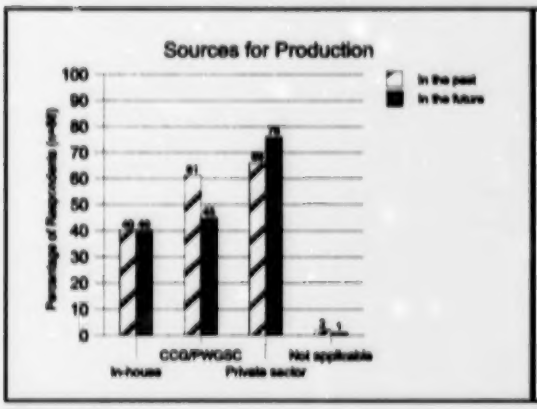


Figure 5

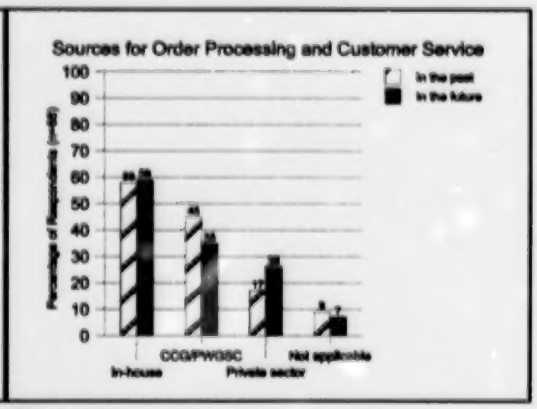


Figure 6

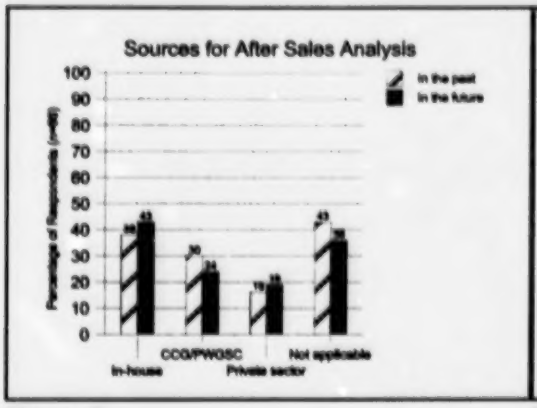


Figure 7

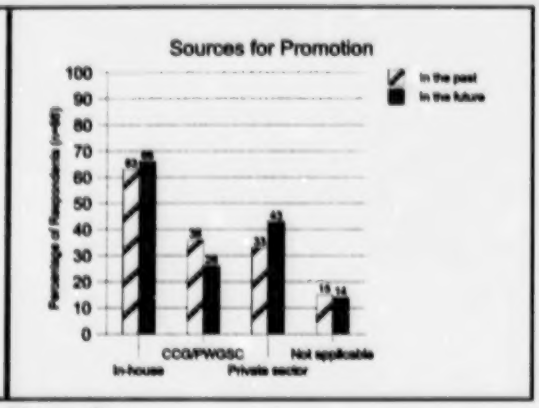


Figure 8

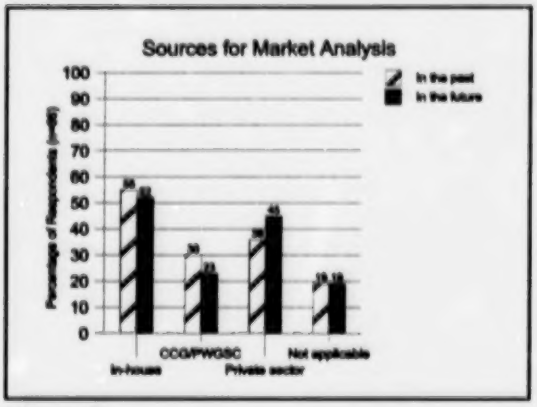


Figure 9

The sources for which PWGSC-Publishing was mentioned by more than 20 per cent of mail respondents were:

- production (45%)
- order process and customer service (35%)
- promotion (26%)
- after sales analysis (24%)

Further analysis of the data revealed that small organizations in terms of publishing (i.e., 5 or fewer programs that disseminate or publish material) were more likely than would be expected to use PWGSC-Publishing in the future (19%) for concept development as compared to CCG in the past (15%).

4.6 Communicating New CGP Services to Target Populations

According to survey findings, CGP will be communicating mostly with managers who tend to be in either communications functions or in service or program delivery functions. Nearly 60 per cent work within one of two types of decision-making structures:

1) decisions and processes are managed by managers, but policies are set centrally; or,

2) publishing policy and guidelines are set centrally. Thirty per cent work in units having five or fewer groups involved in publishing; 26 per cent in 11 or more; and six per cent had 6 - 10 groups involved. Over a third of all respondents could not or did not report the number of programs within their department or agency that were involved publishing or disseminating government information. Only 19per cent indicated that their department or agency produces an annual publishing plan. A total of 58 per cent of all respondents indicated working within a financial structure that permitted them to benefit from revenues received directly from the sale of their publications.

Focus group participants suggested various ways which CGP could communicate with its current and potential clientele, including e-mail, fax, hard copy, and in-person (presentations). Though e-mail was suggested initially, some participants felt that current government architecture did not always accommodate delivery of messages. Moreover, e-mail might not be the best medium to read guidelines; hence, participants preferred receiving hard copy either by mail or fax. They also suggested that they or their DG receive the communiques rather than the ADMs as delivery of such missives was either late or not forthcoming.

5 CONCLUSION

The research indicates that there is qualified support for a centralized database and order desk, particularly if CGP plays a co-ordinating rather than regulatory role. Managers fully recognize the frustration that the public must feel when trying to locate a publication in a department that has been amalgamated, or when searching for a publication that has more than one department or partner as its author. Clearly, a centralized database and order desk will do more than just improve the dissemination of government information: it will also contribute to increased revenues for government as a whole and higher levels of customer satisfaction.

A number of challenges await CGP. Among the most significant is departmental "buy-in". Downsizing has decreased the number of resources available to carry out current work. Additional work — especially when destined for an outside organisation — will not be well received. Therefore, special steps should be taken to promote the benefits of the service and assisting, through tangible means, the collection process.

In anticipation of meeting with the client departments, CGP might wish to prepare a briefing package which clearly defines the role and responsibilities of the service. The package should also include definitions on such terms as "publications" and "publishing" and should specify collection parameters, technology preferences, and how the system will

be maintained. This will greatly assist CGP in establishing its credibility as well as promote confidence among participating members.

Another area of opportunity that CGP can pursue is that of "management publication services". Findings reveal that managers would like to obtain guidance and advice in some 20 publishing-related topic areas. Of particular interest were crown copyright and licensing, Internet publishing guidelines, Depository Services Program, and co-publishing.

APPENDIX A
RESULTS OF FOCUS GROUPS

EXECUTIVE SUMMARY

Findings

- Managers from both large and small departments exhibit broad similarities with respect to publishing issues and concerns.

- With respect to printed publications destined for the general population, most participants stated that they were using a number of channels to disseminate information, including:

  - ✓ The Canada Communication Group
  - ✓ Canada Business Centers
  - ✓ Departmental client centers, regional and headquarters
  - ✓ Departmental public enquiry lines
  - ✓ Exhibitions
  - ✓ Fax on-demand and global fax
  - ✓ Depository Services Program
  - ✓ Mailings to specific target groups
  - ✓ Third party distribution and retailing

- The use of Internet -- as both a publishing and distribution tool — has increased dramatically.

- Managers fully recognize the importance and necessity of having hard copies of electronic publications available for distribution.

- Managers feel that there is a need to have Internet publishing guidelines more fully developed and clearly explained to those involved in the publishing process or for those who are participating in self-publishing.

- Internet is being used by both large and small departments to service their populations -- as a means of publicizing publications and as a tool of access and dissemination.

- Large departments, in particular, feel that there is confusion among Canadians seeking publications, particularly when searching for an older publication, dealing with departments recently amalgamated or restructured, or when publications have been produced in partnership.

- There is enthusiastic support for the notion of a centralized database and order desk.

- A centralized order desk is seen as being highly beneficial, contributing to higher levels of customer satisfaction.
- Managers see the role of the centralized service to be coordinating in nature, with control residing in departments.
- Areas of controversy will center on such issues as scope, role, areas of responsibility and cost effectiveness of the service.
- Half of the participants currently have their holdings recorded centrally on a database.
- Major challenges facing a centralized database and order desk include obtaining departmental "buy-in"; defining the terms "publications" and "publishing", determining collection parameters; ascertaining technology preferences; providing collection assistance; keeping inventory up-to-date; communicating credibility; creating customer satisfaction.
- Offering tangible support to assist departments in the collection and collation process will assure the success of the project.
- Demonstrating a working system, with benefits, will increase co-operation and secure participation in the project.
- Managers see the centralized service starting with mandatory, priced information.
- Managers are seeking guidance and advice for many publishing-related topics, including crown copyright and licensing, Internet publishing guidelines, DSP, publishing and pricing guidelines, wholesaling, delegation of authorities and accounting practices.
- Suggested methods of communicating the new service to target populations include e-mail, fax, hard copy, and presentations.
- Additional issues raised in relation to publishing or communication policies include greater attention to distribution strategies; more emphasis on evaluative mechanisms; better technology and more fully trained personnel to search databases; greater use of the DSP; an assessment of the quantity of information being published; greater use of other communications tools in addition to publications; the strengths/weaknesses of centralized, departmental communications.

1 BACKGROUND

1.1 Positioning

While most parts of the Canada Communication Group have been privatized, certain functions which were previously grouped in the Publishing Division (CCG-P) have been retained and currently reside within the home department, Public Works and Government Services Canada. The former CCG-Publishing, now known as Canadian Government Publishing, is taking steps to reposition itself and its services among its current and potential clientele.

Initial research was conducted through a mail questionnaire in the Spring of 1997 to determine client requirements for key publishing activities, including a centralized order desk and database. To explore in depth why certain results were observed in the quantitative research, two focus groups were held: one with large departments; the other, with smaller ones. This report focuses on the results of the focus group research.

1.2 Research Overview

Similar in scope to the aforementioned survey, the objectives of the focus group research were:

- to determine the level of support and conditions under which clients would support a centralized order desk;
- to gauge concerns about a central order desk;
- to explore clients definition of certain publishing activities;
- to determine current methods of distribution;
- to determine preferred methods of communications;
- to ascertain key messages and venues.

For the purposes of this research, the target groups were defined as managers within large and small departments having a publishing element as an integral part of their program. Appendix E provides the exact screening criteria used in the selection of the focus group participants.

Recruiting was conducted over a one-week period. Each participant was informed of the purpose of the session, its location and time. A confirmation call was given the day prior to the sessions. The first session, held on July 9, comprised eight individuals representing large departments. The second session, held on July 10, was made up of eight individuals representing smaller departments. Recruiting was a

challenge, given the time of year coinciding with vacation time. Appendix E provides a list of participating departments.

The focus group was conducted in formal focus groups at 220 Laurier Avenue West, Suite 1650. A moderator's guide was developed and approved by the project authority. It is depicted in Appendix D.

2 RESEARCH FINDINGS

2.1 Participant Profile

On July 9 and 10, two focus groups were conducted in an effort to better understand the needs, concerns and requirements of public servants involved in the publishing process. Each group had approximately eight participants. The first group consisted of participants from larger departments; the second, from smaller departments.

For the most part, there were no significant differences between the two groups. It would appear that managers from both large and small departments exhibit broad similarities with respect to publishing issues and concerns.

2.2 Dissemination of Information — The Growing Use of Internet

With respect to printed publications destined for the general population, most participants stated that they were using a number of channels to disseminate information, including:

- ✓ The Canada Communication Group
- ✓ Canada Business Centers,
- ✓ Departmental client centers, regional and headquarters
- ✓ Departmental public enquiry lines
- ✓ Exhibitions
- ✓ Fax on-demand and/or global fax
- ✓ Depository Services Program
- ✓ Targeted mailings
- ✓ Third party distribution and retailing

Much discussion centered on the costs associated with the more conventional methods of publishing. To counter budgetary constraints,

almost all participants agreed that the use of Internet -- as both a publishing and distribution tool — had increased dramatically.

"We have 21 publications out of 32 in our publications plan for this year on the web site."

"All our publications are on Internet right now".

In addition to Internet, some participants mentioned other electronic publishing means such as CD ROMs and microfiche.

Though many agreed that electronic publishing was quickly becoming one of their primary means of publishing, it was fully recognized that having hard copies of the electronic version was a requirement. One participant voiced an optimal scenario: having the material electronically stored which the client could then access and print on-demand — at his or her convenience, using his or her budget.

"What I'm looking for now is for a service provider to produce print on demand. What we are offering are only electronic publications. People want to have hard copies which we used to sell through CCG before."

Though many voiced support for the Internet as a distribution venue, some participants felt that policies and guidelines governing the medium needed to be more fully developed. One participant stated:

"Up till recently, the Internet has sort of been an after-thought. What's happening now is that they're publications being developed in parallel. The real challenge is to take a publication and putting it on the Internet, but put it on in a format that people can use."

There were many participants who indicated they were not sure about which publications they should be posting electronically. Also, one participant was concerned about her department's tracking capabilities and its ability to comply with ISO9000 standards. Moreover, many participants were uncertain as to how to post priced publications: to date, only free publications and corporate level-material appear to be populating the Internet. Larger documents were seen to be more problematic.

"We have less larger documents on the Internet. Some of them are just too big. You'd have to have a PDF file. Things like that we haven't tended to get into in any large way at all."

Above all, participants were quick to note that not all Canadians have access to Internet, that — depending on the target group — print, as opposed to Internet, would continue to be the medium of choice.

One participant in each group suggested Internet is allowing them to publish a publication to a specific target audience they would otherwise not be able to publish because of printing costs.

2.3 Accessing Government Publications through Current Distribution Systems — Easy or Difficult?

Most participants in small departments felt that their distribution systems were sufficiently well developed to allow Canadians easy access to their publications. Internet, in particular, was cited by many participants as the department's major "promotional" vehicle, pointing interested visitors to its listing of publications.

"People that are hooked up to the Internet can get that kind of information as to where the publications are available"

"We advertise through our Web site."

Though small departments on the whole felt comfortable with the level and ease of access provided to the Canadian public, there were a few participants who held contrary views:

"I must say that probably 80 per cent of the people coming to our department are at the wrong place for whatever they request."

"At this point, we are having problems with distribution because of the amalgamation of our department with another, larger one....It's a real nightmare. We don't know who is who any more."

Most participants from larger departments, however, held somewhat different opinions. They felt there was confusion among Canadians seeking publications, particularly when searching for an older publication, dealing with departments recently amalgamated or restructured, or when publications have been done in partnership. They felt that pockets of the department had no idea what publications were offered in other parts of the department.

"I think where things fall through the cracks is if it's an older publication as opposed to a current publication. If the distribution office doesn't know it exists, then they're never going to be able to track it down."

"We get confused, since we changed our name...It's difficult when you look at the blue pages. It's not always clear where you're supposed to go."

"The number one area that has problems: identifying. If you haven't heard of the title, how do you know it really exists when people call for it? The department has gone through so many name changes. Tracking it down can be a problem."

"We partner with other organizations, even private companies. There's confusion there because they call us and it's not really our publication."

2.4 Centralized Database and Order Desk — Pros and Cons?

Almost all participants in both groups enthusiastically supported the notion of a centralized order desk. Areas of controversy centered on such issues as the scope, role, areas of responsibility and cost effectiveness of the service. Would it be a regulatory body or a coordinating arm? What sorts of activities would the service provide? Would centralizing such information be more cost-effective than decentralizing it?

Whatever structure, activities, or role the service would assume, participants felt strongly that the service should be coordinating in nature, with control residing in departments.

"It appears to me that a lot of it depends on the status of the publishing distribution system. We're back to whether you're talking about offering a service or you're talking about a regulatory body. I think if you're talking about a service, I think that it's a great way to do it."

Participants were extremely sensitive to the needs of Canadians, as well as booksellers, searching for particular publications. They readily agreed that a centralized order desk would be highly beneficial and contribute to higher levels of customer satisfaction. The concept of one-stop shopping for clients was endorsed by most participants.

"We can make the distinction of which publications are produced by what department, but the average person who calls in...Maybe they're even calling in long-distance. We can't expect the public to know the vagaries of the bureaucracy and who they're supposed to talk to. It would be much better to have one number."

"From the public perspective, the public wants one place to deal with. They don't want to go to one department and be told...we don't handle that. You have to go here and there and everywhere. If the departments want to do their own publishing, that's fine. They should be required to give a certain number of their publications to a central order desk. You've got to look at it from a consumer's side."

"In the legal field, the market is anyone in Canada. You don't want them having to go to the Solicitor General, or House of Commons, etc. There should be one location for that."

Interpretation of the definition, role and workings of a centralized order desk varied widely. While most participants agreed that the service should be one of co-ordination rather than control, there was far less consensus on such issues as what should be distributed, whether the service should include physical storage and distribution, and what information would be distributed. A number of participants suggested that the service only be responsible for priced information. One participant felt that the service should merely be a call-in center, bouncing interested parties to the department in charge for implementation. Another participant shared the same views, but suggested that in addition to directing the call to the appropriate department, the service should have abstracts of not only the publication in question but others which might be complimentary, or emanating from other departments or agencies. Still others expressed the view that it be more inclusive, offering a wide range of services: warehousing, inventory management and control, order taking and payment.

"I thought when you said one-stop shopping it meant they do the whole thing. They print, they distribute, and whatever they have to do with it. In this case, it's totally different from the perspective that I have."

More than half of the participants indicated the benefits of a centralized database, citing their own department's success. Those having such a database are publicizing it over the Internet. The remaining participants indicated that due to the size of their departments, or because of restructuring or lack of resources, no such databases existed. They were looking for help, free-of-charge, from a centralized area.

2.5 Challenges Facing a Centralized Database or Order Desk

While many participants voiced support for such a service, they were also fully aware of some of the major challenges accompanying venture. Many participants felt that departmental "buy-in" was a critical factor. Past experiences with other "centralized" projects, many of which they have seen fail, have left them somewhat hesitant and reluctant to support similar ventures. They need to see some proof that the project is viable and cost-effective — less costly than the system that they are currently using.

"I think we've had that experience and I think it's always in our mind. Is it going to work? Prove it to me first. Then I'll think about it."

"It all comes down to dollars and cents. If it costs you less then they would say, sure, but if it's more expensive...even if it's more convenient, budgets are cut."

Two other participants elaborated on the reluctance of "buying-in", one citing potential job-loss; the other, resistance to change.

"Would we be losing our jobs in our branch if we go with that choice?"

"It's good, but don't change my routine."

Yet another challenge facing a centralized database and order desk is communicating the definition of a "publication". From the two focus groups conducted, it was evident that participants were at times talking at cross-purposes, with different understandings of such terms as "publications" and "publishing". More often than not, participants confused printing costs with publishing costs. Similarly, most participants lumped free and priced materials into one category, calling them all "publications".

"What's a publication? That's the question. One sector...produced, by their definition, over seven hundred publications a year. But in some cases, they only printed five copies. Is that a publication? ...Is a CD-ROM a publication?

Technology was also cited as another major challenge. One participant felt that the proliferation of various programs and architectures would make it difficult for a centralized service to collect and collate all the recorded publications. Which program would best meet a government-wide registry system? How compatible would it be for the centralized service, the department and, ultimately, the end user -- particularly if

he/she is accessing the database through Internet? The other challenge posed by technology is related to Internet, with its myriad self-publishing opportunities. Linked to the aforementioned challenge of defining "publishing", departments cannot feed and maintain a centralized system without guidelines which clearly outline what materials will be considered for input, in what format, and using what software.

"Just getting all the information, and making sure that everybody's using the same kind of technology...that's well beyond my capabilities. I've certainly discovered over the years that nobody seems to be using the same type of technology because you can't down-load anything from anybody else's as easily."

"With the advent of Internet, potentially any one of us could be a publisher. So again, what is a publication?"

Gathering the data, and keeping it current, were as also seen as major challenges. Participants from large departments or those operating under severe budgetary constraints indicated that pulling data together to feed a centralized database would require a great deal of time and resources.

"If you had to pull together a list like that, it would be two years worth of work. One sector put out 800 publications and I think we have 10 sectors in the department."

"It would be a job to go around and ensure that we have a good up-to-date list of everything that is available. One person would have to be dedicated to that for quite a while."

"The real challenge is keeping it updated and maintained."

Finally, one participant mentioned the need to keep many stakeholders satisfied — the departments as well as the retailers and end-users.

"Answering to many publications. Answering to many clients. Answering the clients' requests about the contents of these publications which they have nothing to do with. It's a big challenge."

2.6 Overcoming the challenges

The majority were skeptical about how successful such a centralized service could be given the number of challenges that it would face. That having been said, participants felt that a centralized service offering tangible support, in the way of monetary or human resources, would go far in securing the success of the project. Given that many departments are working under severe monetary and human resource constraints, it would be doubtful whether they could fully meet the requirements that such a project would demand without some type of support.

"They could have somebody catalogue everything and load it on to a database and have somebody who's going to do that on a regular basis and maintain it."

"The easiest way is if PWGSC is going to offer to do it...If they are going to take it off the hands of those who aren't going to have the time to do it or wouldn't normally be able to do it, they would probably get a lot more co-operation."

Also it was felt that achieving a certain level of credibility by demonstrating a working system, with benefits -- including lowered costs and prices, less work from departmental employees, and more customization options for the client -- would greatly encourage people to participate.

"If somebody was to come to me and say, 'We have a system running here. See, it works. Would you be interested in participating in it for X number of dollars per year?', the answer would be 'yes', because then you're talking about something you can see determining what it is or isn't."

"To sell the idea, I think the number of departments that would go with the deal would influence other departments also. If most of the departments are positive about it and only a few departments are left...we'll go with it too."

"I don't think it should be a revenue-making venture. I think that the client should be able to receive these publications at the best price possible. For sure if it's going to be a centralized order desk, there should be something saying that there is no revenue."

"If you've got a publication and it's 500 pages and you are only interested in 30 pages, to customize that publication, that's what I call value added."

With respect to its initial offerings, many participants felt that the

centralized service should start with mandatory, priced information. It was felt that including all publications — free and priced, print and electronic — would be too difficult and unwieldy to manage. By choosing a narrower scope, with more defined parameters, many participants felt that the project would have greater appeal for departments, and therefore, a greater chance for success.

"I think you have to have a moderate goal....Don't try to be everything to everyone in Canada. Define what you want included in your database, with very precise parameters."

"If you take on too much at the start, it's too hard to get started."

"Sold publications only and you give them the information and you let them do it."

2.7 Publications Management Services

There was unanimous agreement among participants that guidance and advice for certain publishing-related subject areas was required. Though one participant suggested that much of the information was already available through Treasury Board, participants nevertheless indicated that further elaboration on the topics was required.

In addition to the previously mentioned topics, additional probing was conducted to determine whether assistance was required in the areas of wholesaling, delegation authorities and accounting practices. Although not rated highly in the mail questionnaires, responses indicated that few participants understood the terms or their implications on the publishing process.

2.8 Communicating the new service to target populations

Participants suggested various ways which PWGSC could communicate with its current and potential clientele, including e-mail, fax, hard copy, in-person. Though e-mail was suggested initially, some participants felt that current government architecture did not always accommodate delivery of messages. Moreover, e-mail might not be the best medium to read guidelines; hence, participants preferred receiving hard copy either by mail or fax. They also suggested that they or their DG receive the communiques rather than the ADMs as delivery of such missives were either late or not forthcoming.

2.9 Other issues related to publishing or communication policies

When asked what other issues they felt government should address with respect to publishing, participants suggested a number, including better distribution strategies to ensure that the right populations were receiving their publications. Several participants suggested that more emphasis be placed on evaluative mechanisms to ensure the utility of information published.

Yet another participant suggested better technology and more fully trained personnel to search and record respondent comments. A suggestion was made that more attention be accorded the DSP which the participant felt was a major mechanism for restoring government credibility. One participant voiced the opinion that far too much was being published at great expense to the taxpayer; that more stringent guidelines should be applied to what gets published. He suggested that there were other means of communicating with the public other than publications. Finally, some participants voiced concern over the lack of centralized publishing plans, while others supported decentralization and did not wish to either control or have information controlled, particularly with materials destined for the Internet.

APPENDIX B
RESULTS FROM MAIL QUESTIONNAIRE

Background and Introduction

PWGSC's Publishing Division is interested in gauging client reactions to a number of services that it currently offers or might wish to offer in the future to its client author departments. The objective of the survey described in this report was to solicit and assess client departments' reactions to the establishment of a common service that would see Publishing providing an array of services to author departments, including:

- creation and management of a publications database, which records all federal government publications currently in the inventory;
- provision of a single access point and order desk, for external enquiries and orders, sales and receivables on behalf of the client department;
- guidance and administration on copyright and negotiation of licensing agreements, and;
- project management services and specialized development, production, and marketing services.

This report describes the findings from a mail survey sent to PWGSC Publishing clients.

Methodology

Approximately 200 survey questionnaires were mailed to federal government managers responsible for publishing. A total of 86 completed questionnaires were returned by mail or fax, for a response rate of 43%. If the total population of managers involved in publishing were reached by the survey, and it can be assumed that those who responded are representative of the total population, the returns would provide a margin of error for estimates to within ±7.5%, 19 out of 20 times.

Results

Respondents Characteristics

Respondents served a number of functions within their organizational units, and some respondents specified more than one function. Overall, respondents tended to be in either communications functions or in service or program delivery functions. The number of respondents working in each function are listed below:

• Communications	40
• Service/program delivery	40
• Policy	11
• Finance/administration	9

The questionnaires were completed primarily by management level respondents. The number of respondents within management, operational, and support categories is presented in the following list:

- Management 60
- Operational 21
- Support 5

Respondents also reported on the decision making structure within their organizations. The following list describes their responses:

- All decisions are made centrally (n=10);
- Publishing policy and guidelines are set centrally (n=30);
- Process is managed centrally, but decisions rest with individual managers (n=13)
- Decisions and process are managed by managers, but policies set centrally (n=34)
- Process is managed by individual managers, decisions are made centrally (n=7)

Over a third of all respondents could not or did not report the number of programs within their department or agency that were involved in publishing or disseminating government information (see Figure 1). Of those who did respond, 49% reported that five or fewer groups were involved in publishing, 9% had 6 to 10 groups involved, and 42% reported having 11 or more groups involved in publishing.

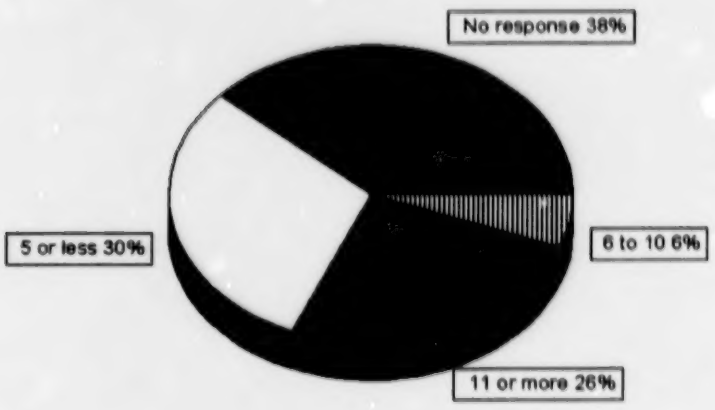


Figure 1

Overall, 16 respondents, or 19% of the total sample, indicated that their department or agency produces an annual publishing plan.

Publishing Activity

Respondents reported on what sources have been used in the past and what sources they believed they would require for the future. Figures 2 through 13, presented on the next two pages, show the estimated past and anticipated future use for each of 12 sources. In general, it can be seen that in-house resources were cited most often for past and future publishing activities. Private sector sources were the next most mentioned sources. However, for a number of activities at least one in five respondents reported having a need for PWGSC-Publishing, although the proportion is less than reported use of CCG-Publishing in the past.

The sources for which PWGSC-Publishing was mentioned by more than 20% of respondents were:

- production (45%);
- order processing customer service (35%);
- promotion (26%);
- after sales analysis (24%), and;
- market analysis (23%).

Further analyses of the data revealed that small organizations in terms of publishing (i.e., 5 or fewer programs that disseminate or publish material) were more likely than would be expected (statistically) to use the following:

- the CCG in the past (15%) and the PWGSC in the future (19%) for concept development;
- the private sector for production (77%) in the past and production (89%), electronic product development (77%), and promotion (54%) in the future, and;
- in-house resources (73%) for promotion in the past.

Large organizations (i.e., with 11 or more programs that disseminate or publish material) were more likely than would be expected to use the following activities:

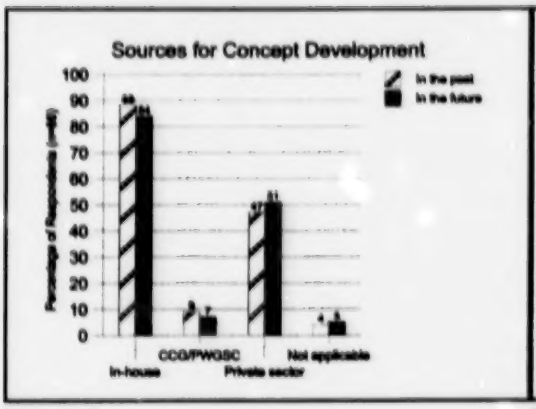
- the private sector in the past for market analysis (59%), business case analysis (36%), design, layout, and composition (82%), production (82%), and promotion (64%);
- the private sector in the future for concept development (68%), writing and editing (91%), design, layout, and composition (82%), electronic product development (77%), production (86%), and promotion (64%), and;
- in-house resources in the past for promotion (64%) and in the future for business case development (64%).

Slicing the total pie a different way, it was also found that departments or agencies that produce an annual plan, compared to those that do not, were more likely to use:

- the private sector in the past for content research (75%), design, layout, and composition (81%), production (94%), and promotion (63%), and;
- the private sector in the future for content research (81%), electronic product development (88%), and promotion (75%).

On the other hand organization that do not produce an annual publishing plan were more likely to use:

- the private sector for writing and editing (75%), and;
- the PWGSC for order processing and customer service (6%).



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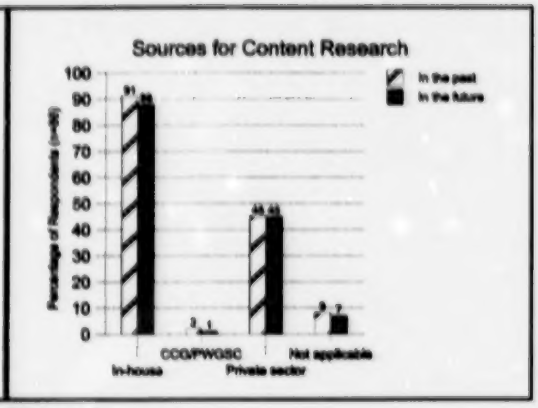

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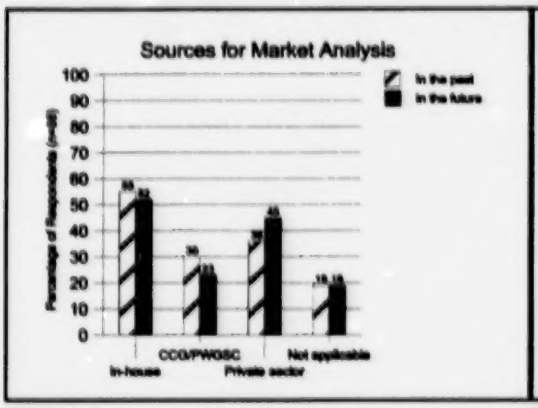

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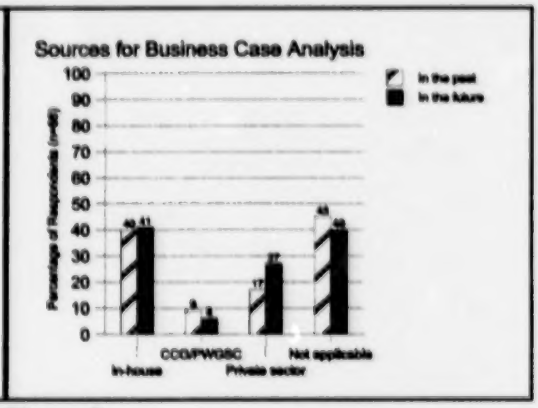

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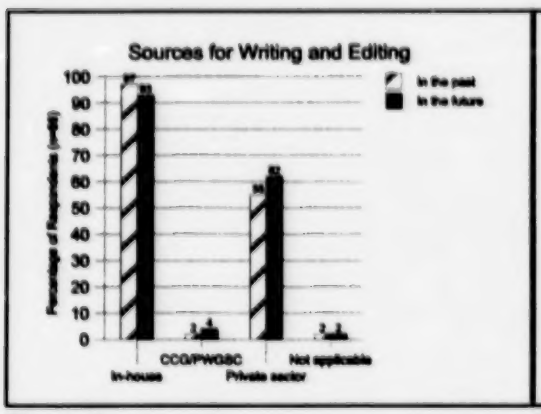

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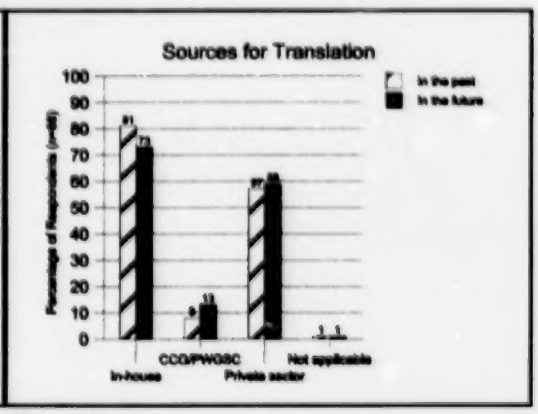

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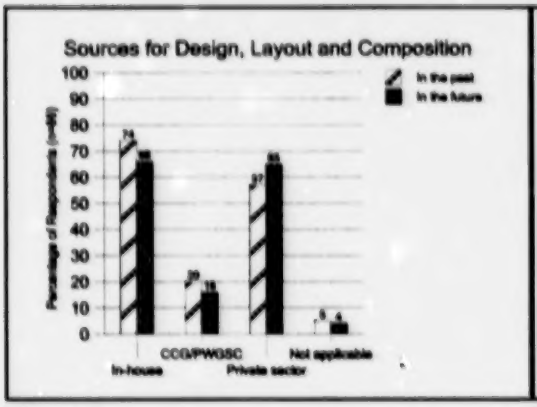

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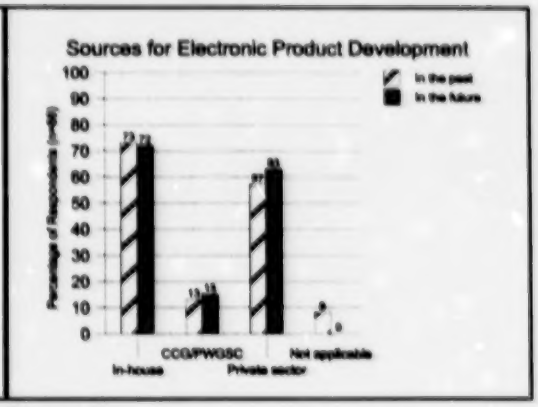

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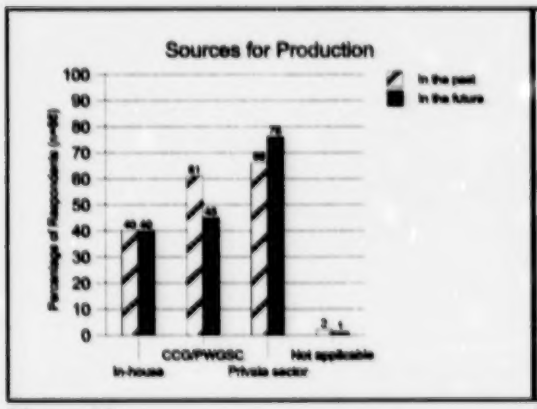

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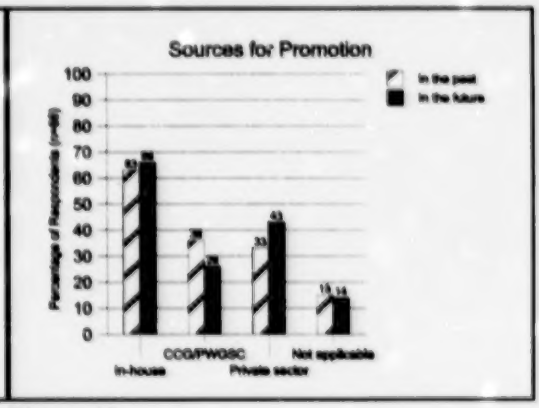

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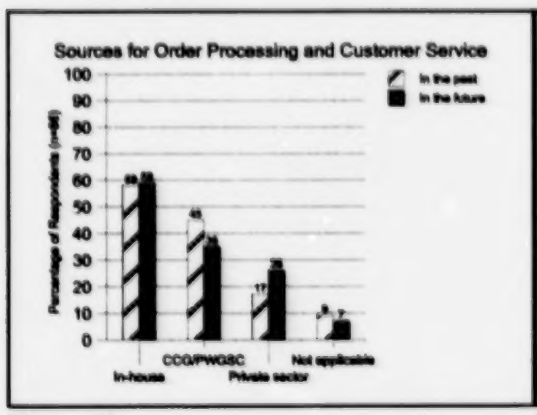

Figure 12

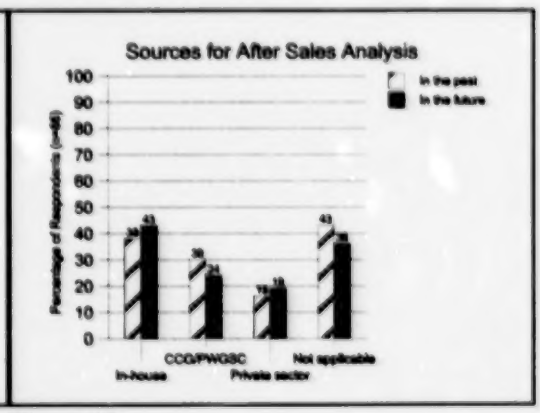

Figure 13

Publications Management Services

Respondents indicated whether or not they would likely need advice or guidance on any of 20 topic areas. The results show that a substantial proportion of respondents report a need in most areas. The following percentages of all respondents (n=86) indicated likely needing advice or guidance in each of 20 topic areas:

1. Crown copyright and licensing 58%
2. Internet publishing guidelines 45%
3. Depository Services Program 43%
4. Co-publishing 41%
5. Costing and pricing guidelines 36%
6. Electronic publishing 35%
7. Sales and promotion practices 34%
8. Communications policy (publishing) 33%
9. Contracting procedures 30%
10. Publishing on-demand 29%
11. Alternate format policy 24%
12. Market analysis practices 23%
13. Methods of dissemination 22%
14. Federal Identity Program 21%
15. Format options 17%
16. Official Language policy 13%
17. Retailing policies 13%
18. Delegation authorities 11%
19. Wholesaling policies 7%
20. Accounting practices 1%

Figure 14 shows respondents' reaction to the scenario:

> *"If a central government organization offered publications management services —that is, contract management including project coordination, consultation, and advice on publishing activities and issues— would you be interested in obtaining these services?"*

As the figure illustrates, almost half of the total respondent indicated that they would not be interested in this type of central government service. Over a third of the respondents had a conditional answer. Of those respondents (n=30), the most frequently mentioned factors affecting their decision were as follows:

- the competitiveness/cost-effectiveness of the central service (n=13);
- the added value the central service could offer (n=8);
- the willingness of the central service to play a limited role (n=6), and;
- the particular operational procedures that would be involved (n=4).

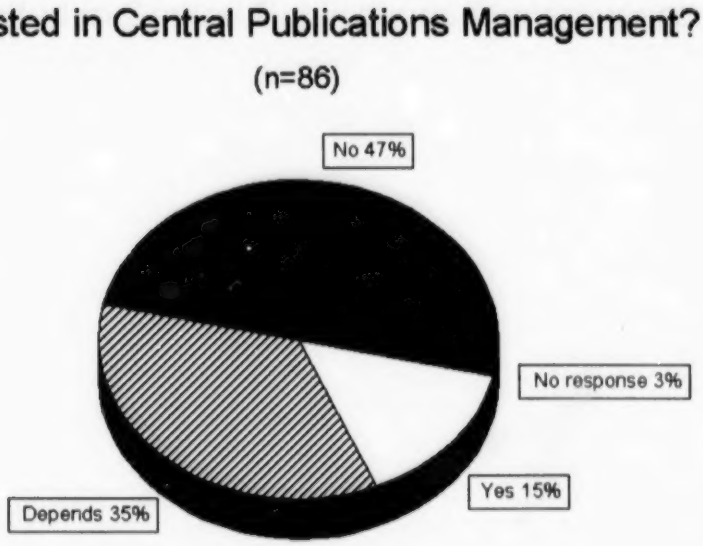

Figure 14

Database of Publication Holdings and Ordering Desk

Fifty-six percent of all respondents keep a listing of all of their publications, and a further 29% keep partial listings. Only 12% keep not publications listings at all (see Figure 15).

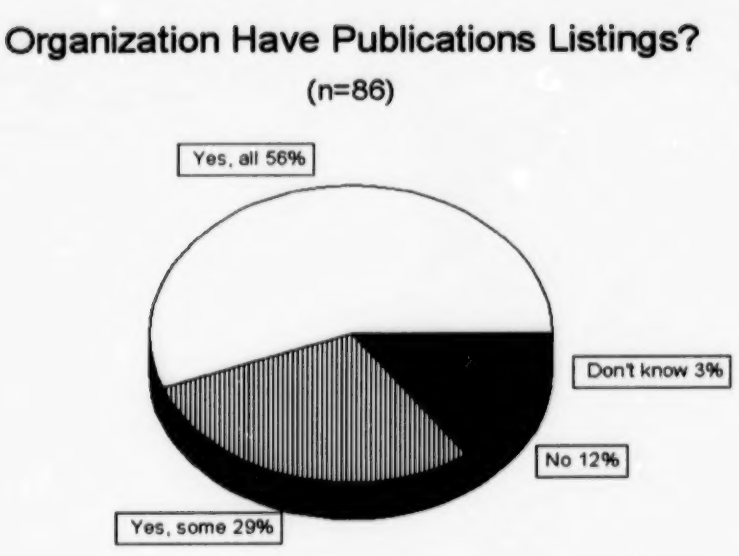

Figure 15

Of those organization that keep full or partial listings of their publications, the following information was reported as being included in these listings (percentage of respondents with listings, n=73):

1. Title 88%
2. Catalogue number 58%
3. ISBN or ISSN number 53%
4. Format 51%
5. Abstract or description 43%
6. Unit price 36%
7. Location 34%
8. Inventory information 27%
9. Distribution list 25%
10. Unit cost 15%

The majority of respondents reported that their organizational unit makes copies of their priced and free publications, both in print and electronic, available to the general public (see Figures 16 and 17). This availability is exclusive of the Depository Services Program and its library network. Interestingly, a large proportion of respondents were not aware of what was made available to the public, possibly indicating a lack of focus or priority given to this function by managers.

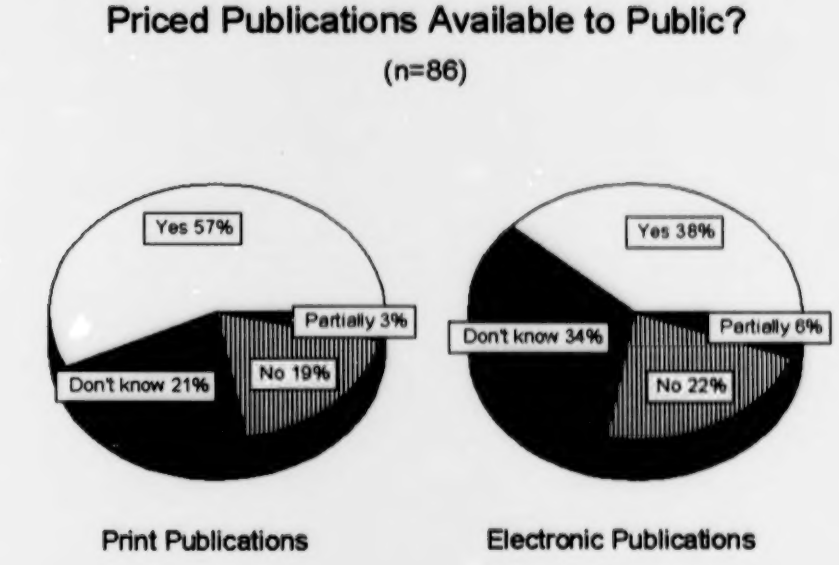

Figure 16

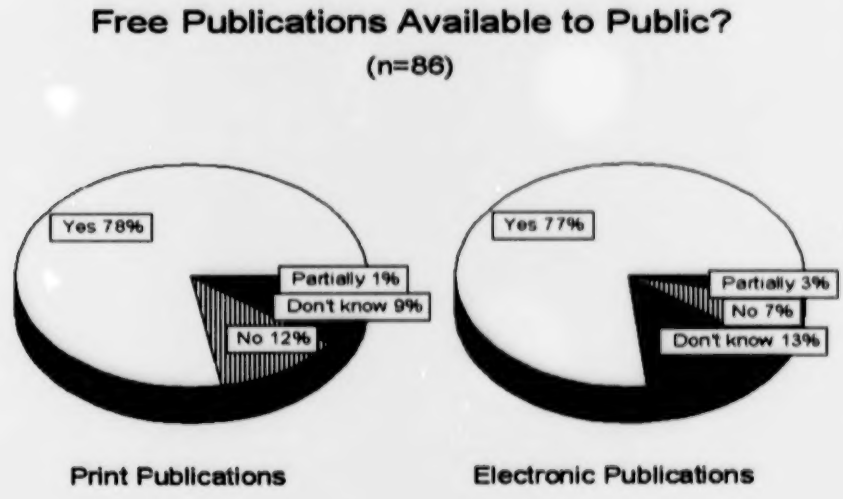

Figure 17

For priced publications, a quarter of the respondents (26%, n=86) indicated that distribution services for print publications were handled in-house, while only slightly more indicated that the services were handled externally (28%). Eight percent reported this service was provided both internally and in-house, and over one-third (38%) did not know. Of those respondents who reported external sources, those mentioned included the CCG (n=14), the PWGSC (n=8), other government services (n=4), and commercial printers (n=3).

Further, electronic publications were handled in-house by 30% of units, externally by 8% of units, and both in-house and externally by 8%. Well over half of the respondents were unable to answer (59% did not know). The external sources mentioned included the PWGSC (n=2), the CCG (n=2), university printers (n=2), other government services (n=1), and secondary distributors (n=1).

For free publications, distribution was handled in-house by over two-thirds of all units (69% for print and 67% for electronic), and externally by fewer than one in ten units (7% for print and 8% for electronic). For both print and electronic publications, 5% indicated both in-house and external services, while 20% did not know about their distribution. External sources for print included the Depository Services Program (n=3), commercial printers (n=2), and Enquiries Canada, the CCG, and other government services with one mention each. External sources for electronic services included the CCG (n=3), the Internet (n=3), university printers (n=2), and the Depository Services Program (n=1).

Respondents were also presented with the following scenario:

> *A recent, independently-conducted, consultation with users of published government information indicated that customers, i.e., the Canadian public, "want to be able to go to one place for all government publications, rather than call a series of departments in search of their title; and they want to be able to both identify and order that publication in a single transaction."*
>
> *a) Given that such a point of service requires departmental support and government-wide coordination, with the benefit being increased customer satisfaction, do you support government providing a centralized service to manage order processing, enquiries and customer service (i.e., complaints, returns etc.)?*

Figure 18 presents the responses obtained to this scenario. Overall, over three-quarters of respondents would give at least partial support for the idea of a single government point-of-service for publications. Respondents who strongly supported the service said it was because there is a need for central turnkey services (n=14) and the central service would be more efficient (n=10).

Respondents who only somewhat supported the service voiced concerns that the service be an efficient use of resources (n=17), whether central turnkey were the best option available (n=5), that adequate monitoring would be possible by client departments (n=4), as well as concerns about timeliness of distribution (n=2), loss of client contact (n=2), whether

consistent policies could be developed (n=2), and whether alternative formats would be adequately addressed (n=2).

Finally, respondents who did not support the service said that a central services would not be efficient (n=5), that adequate monitoring would not be possible (n=4), there is no need for turnkey services (n=2), there would be no option for alternative formats (n=2), and policy would not be consistent (n=2).

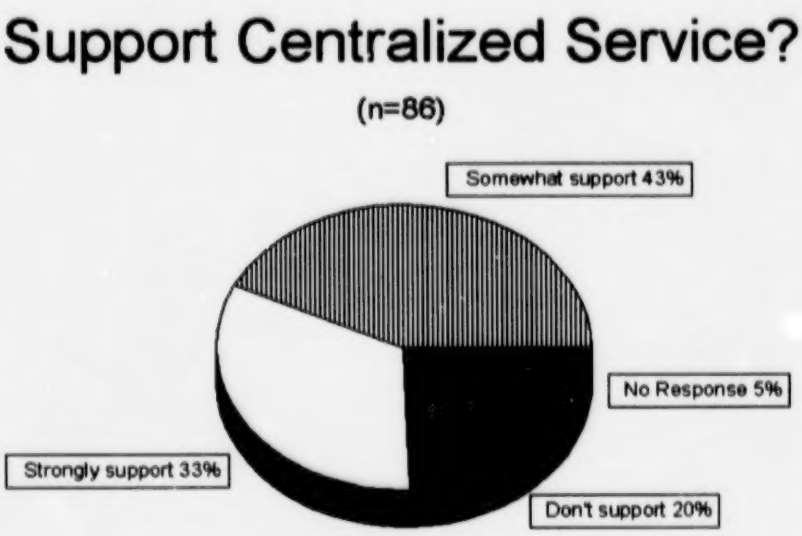

Figure 18

Almost half of the respondents (45%) reported that their organizational unit could supply information manually on all of its active publications holdings to a government-wide, central database by December 31, 1997, while an additional 22% could provide some information. Although 20% did not know, only 4% said they could not provide any information. Two respondents said they would not be able to comply unless resources were made available to them.

Fewer respondents, slightly more than a third (37%), said their organizational unit could supply this information electronically, while 28% could provide some information. Again, 19% did not know and 4% could not provide any information. While two respondents again mentioned a lack of resources, four respondents said it would depend upon the specific reporting requirements.

Warehousing, Inventory Management, and Distribution

Respondents were given the following scenario regarding government warehousing, inventory management, and distribution services:

> *Federal government departments/agencies now have the option of obtaining Warehousing, Inventory Management and Distribution Services directly from the private sector. This can be done, in accordance with Treasury Board approved contracting thresholds, through a) standard procurement practices or b) the Preferred Administrative Arrangement (PAA).*

In response, the following categories were mentioned (n=86):

- In-house 33%
- PAA 9%
- Private sector 14%
- In-house and private sector 11%
- In-house and PAA 7%
- PAA and private sector 2%
- In-house, PAA, and private sector 5%

Reasons given for in-house services were that there were no current requirements (n=12), for cost-effectiveness (n=6), and to ensure monitoring and control (n=2). The PAA was chosen for cost-effectiveness (n=2), and experience with similar past services (n=1). The private sector was preferred for cost-effectiveness (n=3), experience with similar past services (n=2).

Funding Structures

As Figure 19 shows, appropriation funding is the most common funding structure at both the departmental/agency level and at the organizational unit level, with almost two-thirds at both levels. Net voting was next most common, with revolving funds being the least common structure.

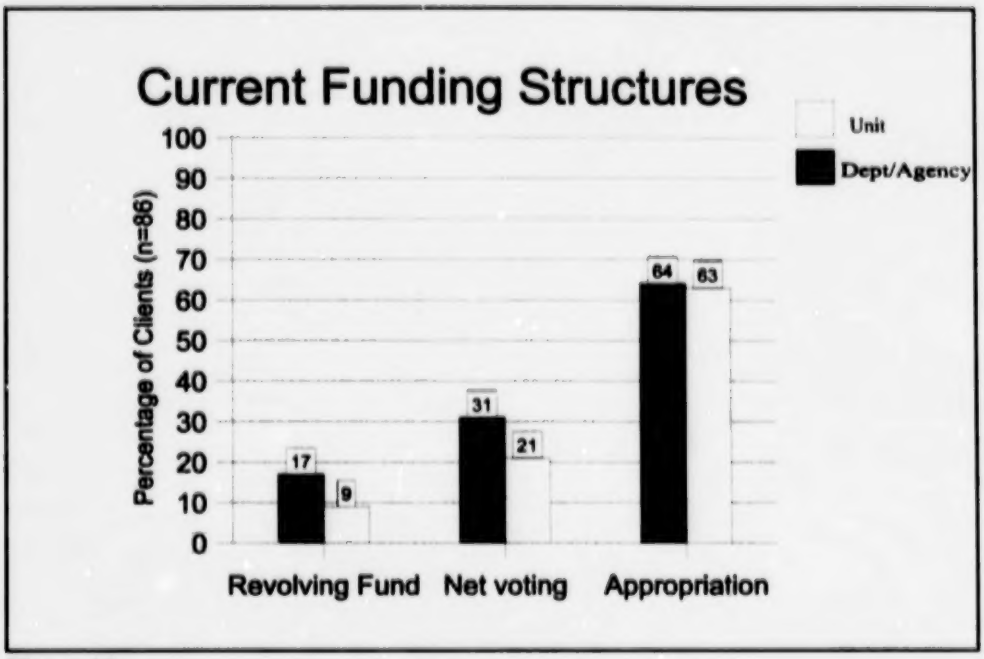

Figure 19

Only 12% of all respondents reported that their organizational unit was planning on changing its funding structure (see Figure 20). Of these 10 units, 7 were planning on changing to cost-recovery, 2 were planning on changing to appropriation funding, and one was planning on changing to a revolving fund. Six respondents did not know when this change would take place, two believed it would take place in FY 1997-98, and two believed it would take place in FY 1998-99.

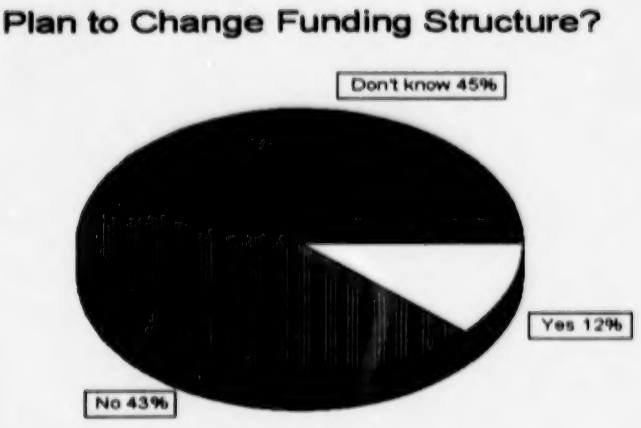

Figure 20

Conclusion

PWGSC-Publishing is seen as just one of many possible sources for publishing services, including in-house services. As such, PWGSC-Publishing must be able to demonstrate to its clients that any services it offers have clear value-added at a competitive price. Although PWGSC-Publishing was not found to be widely considered as a source of services, it was found to have select niches that could be developed into business opportunities. For example, PWGSC-Publishing has some activity areas where it is considered as a future source of services by client departments. Specifically, these were: production, order processing customer service, promotion, after sales analysis and, market analysis.

Client departments also have need for advice and guidance that can be provided by PWGSC. The top five areas mentioned were:

1. Crown copyright and licensing
2. Internet publishing guidelines
3. Depository Services Program
4. Co-publishing
5. Costing and pricing guidelines

As well, over three-quarters of respondents supported the idea of a single government point-of-service for publications. The primary consideration that was raised by clients in regards

to any services offered through PWGSC-Publishing was that they need to be competitive with comparable services available from other sources in terms of quality of service and especially price.